

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

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**PSA: 1**

**Provider: Legal Services of Northern California**

**Counties: Humboldt and Del Norte**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 2**

**Provider: Legal Services of Northern California**

**Counties: Lassen, Modoc, Shasta, Siskiyou, and Trinity**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 3**

**Provider: Legal Services of Northern California**

**Counties: Butte, Colusa, Glenn, Plumas, Tehama**

Optional Success  
Story(ies)/Case Summary(ies)

None Stated

Optional Information on  
Collaboration with Other  
Advocacy Groups

None Stated

**PSA: 4**

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**Provider: Yuba Sutter Legal Center**

**Counties: Sutter and Yuba Counties**

Optional Success  
Story(ies)/Case Summary(ies)

Staff made a total of 53 outreaches to clients who were either homebound, lived in the Yuba County foothills or Live Oak, or who lacked transportation. Staff prepared documents, notarized documents and provide advice and counsel to the clients. This included six seniors receiving hospice care.

The directing attorney attended six trainings on legal issues affecting seniors and shared that information with the staff. The directing attorney and legal assistant attended both trainings offered by CDA/SAGE on serving older LGBT adults.

The Legal Center entered into memorandums of understanding with Yuba County Health and Human Services and Yuba County Victim Witness to coordinate services for seniors, the low income and victims of crime.

Worked out settlement in one eviction case, defended client against restraining order, prepared answers in three eviction cases for senior clients, represented senior in obtaining a restraining order.

Assisted homeless Sutter County senior by taking her to Hands of Hope, Bridges to Housing and Sutter County Welfare to obtain necessary documents and sign up for assistance. Made outreach to local hospital to assist senior homeowner in filing for assistance with Keep Your Home California and made sure application was filed on final day program accepted applications.

Optional Information on  
Collaboration with Other  
Advocacy Groups

The Directing Attorney attended the Yuba County Commission on Aging meetings in April and May and chaired the monthly Yuba County Adult Action Team where Yuba County agencies serving seniors discussed/referred common clients.

The paralegal attended the Sutter County Adult Action Team where Sutter County agencies serving seniors discussed/referred common clients.

(Both adult action teams are composed of representatives from Behavioral Health, Public Guardian, Adult Protective Services, In-Home Support Services and Legal Services and other agencies.)

The Directing Attorney attended award luncheon in April sponsored by Sutter County Victim Assistance to remember victims of abuse.

Staff referred clients needing information on Medicare or supplemental health insurance to HICAP. Staff referred three seniors to Community Legal. Staff took brochures on the Legal Center and its services to FREED.

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**Provider: Community Legal, Inc.**

**Counties: Nevada**

Optional Success  
Story(ies)/Case Summary(ies)

Told from the perspective of one of our staff members:  
In April, I received a phone call from a woman who was the defendant in a small claims case. Her previous landlord had filed suit against her and her husband, claiming that they owed money for unpaid rent, and for miscellaneous repairs. I scheduled an appointment to assist them with going over the paperwork, and to provide them information on filing a counterclaim. At the appointment, I helped them complete the counter claim forms, and provided them with printouts explaining the court process and what to expect. I also provided them with a list of information, receipts, letters, etc. that they would benefit from collecting for the civil suit. The couple came back for several follow up appointments, so that I could provide them with various forms assistance and so that I could provide them with printouts of relevant sections of the CA Civil Code regarding landlord tenant rights. They were very happy with the assistance, and felt that Community Legal had empowered them by providing them with the information and assistance they needed to confidently represent themselves in court. They couple called Community Legal in June to again express their thanks, to inform us that they won the counter suit, and to say that they do not feel that it would have been possible without our assistance.

Optional Information on  
Collaboration with Other  
Advocacy Groups

-Community Legal staff provided on site clinics at FREED Grass Valley and Marysville.  
-Community Legal executive director is currently enrolled in a class that allows for networking with other EDs of local non profits, many of which serve seniors.

**Provider: Community Legal, Inc.**

**Counties: Sierra**

Optional Success  
Story(ies)/Case Summary(ies)

Erin continued her volunteer service in Sierra County and has been assisting a woman extensively in the area with a housing issue. This woman likely has a mental illness, and would otherwise be unable to seek counsel that would be as patient and understanding. Her issues are on-going, but we hope to continue to assist her to the best of our abilities.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Sacramento Senior Legal Services**

**Counties: Sacramento**

Optional Success  
Story(ies)/Case Summary(ies)

A woman in her early eighties applied for federally-subsidized housing owned by the local Public Housing Authority ("PHA"). The PHA denied her application, alleging she declined multiple offers to accept housing. The woman contested the PHA's allegations, stating that her disabilities prevented her from completing certain application forms. An SLH staff attorney helped the woman obtain a letter from her primary healthcare provider. The letter verified the woman's disability and noted her difficulties with comprehension and ability to complete forms. With the healthcare provider's verification letter, the SLH staff attorney contacted the PHA to request a reasonable accommodation on the woman's behalf to rescind its denial her application for housing, and to allow her to complete her paperwork.

A married couple in their late sixties applied for Medi-Cal benefits with Sacramento County's Department of Human Assistance ("DHA"). The DHA denied the couple's application on the grounds they had failed to submit detailed statements of their retirement accounts. The couple obtained a balance statement of their shared retirement account and provided it to an SLH staff attorney. The staff attorney contacted a DHA caseworker and forwarded that balance statement to the caseworker. The staff attorney asked the caseworker to resolve the situation expediently, but also noted he would help the couple to request a State Hearing if the County did not approve their application. The DHA caseworker promptly rescinded the County's denial notice, and approved the couple's Medi-Cal application without the necessity of a State Hearing.

A woman in her early eighties was served with a Summons and Complaint, notifying her that a former acquaintance had sued her in Sacramento Superior Court. With its lawsuit, the Plaintiff concurrently filed a motion that asked the court to order the woman release numerous items of personal property to the Plaintiff before trial. The woman disputed the Plaintiff's allegations that he owned the property at issue. An SLH staff attorney helped the woman draft an opposition document to the Plaintiff's motion, and advised the woman about how to properly serve and file her opposition. The staff attorney also advised the woman about gathering evidence and presenting her arguments to the judge at the hearing.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Community Legal, Inc.**

**Counties: Yuba**

Optional Success  
Story(ies)/Case Summary(ies)

An older gentleman from Yuba County came to our family law clinic to ask questions related to reducing spousal support. He is a retired teacher and felt that his support obligations was preventing him from retiring fully. We were able to provide him with the information and assistance needed so that he could file for a spousal support reduction. He expressed much gratitude.

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Sutter**

**Counties: Sutter**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

-Community Legal staff provided on site clinics at FREED Grass Valley and Marysville.  
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**Provider: LSNC - Mother Lode**

**Counties: Placer**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC advocates continue to collaborate with a wide variety of elder and disability rights groups locally, statewide and nationally. Due to the confidential nature of the legal services we are not always able to report with whom we are collaborating at the time we are doing so. For example, this office has collaborated in the past with the California Department of Justice, various district attorney's offices, law enforcement and medical/social service providers on cases for our older clients.

April 2018 - Participated in discussion with Placer County Adults Protective Services to update resources for vulnerable and at-risk seniors.

May 2018 - Continued working with Protect in May. Also have two active cases with Placer County Adult System of Care.

June 2018 - A Mother Lode Regional Office advocate participated on the Planning and Preparation Team for the annual Placer County PROTECT event.

A MLRO advocate attended the annual Placer County PROTECT event. Participants in the 4 hour event at the Roseville Galleria included Placer County APS, PC Adult System of Care social workers, PC Victim Services, Placer DA's office, Placer Older Adult Advisory Commission, California Department of Justice (Elder Abuse Investigations), DMV, Placer Veteran's Services of Northern California Senior Program, LSNC Pension Rights Program and others. A full list of participants can be provided. A count of the number of attendees can be provided by the DA's office but more than 200 person attended as counted by LSNC.

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**Provider: Legal Services of Northern California**

**Counties: Yolo**

Optional Success  
Story(ies)/Case Summary(ies)

Ms. X is an older adult with multiple mental disabilities. She was served with an unlawful detainer lawsuit by her landlord claiming she was not complying with her lease because she was creating too much noise. She lives in low income housing and receives Supplemental Security Income. She did not understand the notice or its impact on her housing so she sought assistance at Legal Services of Northern California's Yolo office. LSNC attorneys reviewed the notice and requested a meeting with the landlord. LSNC attorneys requested that the landlord rescind the notice and permit her to continue her lease as a reasonable accommodation for her disability so long as she agreed to comply with the lease terms. The landlord agreed to permit her to stay so long as she complies with the lease. The parties entered into a settlement of the unlawful detainer complaint before trial.

Ms. A contacted LSNC because she was threatened with eviction at her low-income apartment complex. Her adult son, who does not live with her, showed up at her apartment complex and got into a fight. She had not invited him to visit. He then broke into her apartment. She was frightened of him and left once she saw him there. She asked LSNC for help. LSNC asked for a meeting with management to discuss a resolution. The apartment complex indicated they would let her remain if she obtained a restraining order. He had threatened her in the past and she was scared he might hurt her. LSNC represented Ms. A in a restraining order hearing and the Judge entered an order requiring her son to remain 200 yards away from Ms. A's apartment. The apartment complex agreed to drop the matter and Ms. A was able to continue her tenancy.

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC staff holds office hours at the following locations:  
Esparto: 1st Thursday of the month, every other month at RISE;  
West Sacramento: 4th Thursday of the month at the Senior Center;  
Knights Landing: As needed, 1st Monday of the month at the Center for Families;  
Winters: date to be determined. The RISE seniors group no longer meets so we are searching for alternate outreach opportunities in Winters.  
Clarksburg: As needed 4th Thursday of the month at library.  
Davis: 1st Monday of the month at Grace in Action (housed at the United Methodist Church).  
In addition, LSNC attends monthly meetings of the Multi-Disciplinary team with APS, HHSA, and other advocates for older adults. LSNC also participates in regular meetings of the Yolo County Health Aging Alliance (YHAA) and chairs the YHAA Collaboration Subcommittee attended by Yolo County older adult service providers.  
Legal Representation: 16.60  
Legal Advice/Assistance: 69.70  
Community Education: 10  
Special Outreach: 0  
Total Hours: 96.30

**PSA: 5**

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**Provider: Legal Aid of the North Bay**

**Counties: Marin County**

Optional Success  
Story(ies)/Case Summary(ies)

Advised senior regarding his rights to meal and rest breaks under CA law.

Advised senior regarding the law of wrongful termination from employment and directed her to services for unemployment benefits.

Advised disabled senior regarding pursuing Small Claims Complaint against hit and run driver who damaged her car.

Advised senior of the: (1) laws around maximum allowable security deposit for residential tenancy (2) legal reasons for a landlord to deny a person an apartment and (3) the statutory language that must be included in a 30 or 60 day notice. Referred senior to Fair Housing Advocates of Northern California for investigation into any possible discrimination issues.

Assisted senior (1) to file a demurrer in response to an unlawful detainer complaint and (2) to negotiate a settlement agreement at Mandatory Settlement Conferences, thus avoiding an eviction judgement against him.

Advised senior on possible forums and applicable statutes of limitations available for an independent contractor to obtain wages from a government agency.

Advised senior regarding her desire to obtain more hours at her current employment and provided the following: (1) information on discrimination based on disability and age, (2) information on retaliation, (3) a resources guide highlighting services from organizations such as Whistlestop and SF-Marin Lawyer Referral Service, and (4) a flyer for Lawyers in the Library.

Advised a senior regarding a dispute with her former employer and of her potential wage and hour claims and gave her referrals to the SF Lawyer Referral Service and the DLSE.

Advised a senior of her right to a reduction in work hours and referred her to Bay Area Legal Aid's Legal Advice Line to obtain advice about possible rights to unemployment benefits.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 6**



## **California Legal Services (Title III B)**

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**Provider: La Raza Centro Legal, Inc.**

**Counties: City & County of San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

N/A

Optional Information on  
Collaboration with Other  
Advocacy Groups

MONTHLY LEGAL CLINIC WITH CURRY SENIOR CENTER FIRST THURSDAY OF THE MONTH  
MONTHLY LATINO PARTNERSHIP FOR SERVICE PROVIDER MEETINGS AND PRESENTATIONS  
TO GROUPS OF SERVICE PROVIDERS INCLUDING CAREGIVER ALLIANCE  
COLLABORATION WITH EDC ATTORNEY IN EVICTION CASE FOR ELDER  
ONGOING CASE COLLABORATION WITH EDC AT OUR MONTHLY CLINICS  
ASSISTANCE IN ADMINISTRATION AND LEGAL REPRESENTATION OF CLIENTS IN MAYORS  
OFFICE OF HOUSING AND COMMUNITY DEVELOPMENT BLOCK GRANT, TOOK ON 4 DIFFERENT  
EVICTION DEFENSE CASES  
QUARTERLY ELDER RIGHTS BULLETIN WITH ALLIED LEGAL SERVICE PROVIDERS – LA RAZA  
WROTE SPRING ISSUE ON CALIFORNIA RENT LIMIT AND USURY LAW DURING DISASTERS

**Provider: Legal Assistance to the Elderly**

**Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

•Ms. K has lived in her apartment for over 40 years. She raised her two sons in this unit after immigrating to the US from South Korea. A few years ago, her adult son asked to temporarily stay with Ms. K after losing his business, his children in a custody battle, and a long battle with substance abuse and mental health issues. However, he began physically abusing Ms. K shortly after moving in and causing other extreme nuisances. He refused to leave her alone – even after she repeatedly called the police.

LAE was able to help Ms. K file for and obtain a domestic violence restraining order, and her son has not returned to her home since the RO was granted. Furthermore, LAE was able to help Ms. K negotiate an agreement that allowed her to remain in her home. Before working with LAE, HK did not know she could file a RO and lived in constant fear. Now, Ms. K can stay in her rent controlled unit, close to her friends at the Korean senior center and other Korean social/financial resources.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We have a strong ongoing collaborative relationship with Adult Protective Services. They consult with us on a regular basis on landlord tenant and elder abuse issues and refer a significant number of clients to our legal staff. In many instances they continue working with our clients after the referral and facilitate our representation by providing services such as translation, transportation and emotional support. We also work with other legal services organizations and community based non-profits, providing assistance and representation when needed.

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**Provider: Nihonmachi Legal Outreach dba API Legal O**   **Counties: San Francisco**  
**Outreach**

Optional Success Story(ies)/Case Summary(ies)	N/A
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Optional Information on Collaboration with Other Advocacy Groups	N/A
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**Provider: Asian Americans Advancing Justice - Asian**   **Counties: San Francisco**  
**Law Center**

Optional Success Story(ies)/Case Summary(ies)	<p>Client YZ is a disabled man who attends psychotherapy on a weekly basis. He lives in the in-law unit of a single family home in Visitacion Valley with his wife and two kids. They are an extremely low-income family that spends more than half of their monthly income on rent. They have lived in this home for nearly a decade. For their youngest child, this is the only home he's ever known.</p> <p>Client YZ came to our clinic in May because he received an eviction notice for a relative owner move in. As we investigated his case, we learned that since new owners had purchased the house in March 2018, they had been harassing Client YZ and his family in order to push them out of the house. The service of an eviction notice was just one part of a larger pattern of bad faith conduct.</p> <p>For instance, the new owners had repeated notice of habitability issues, such as lack of heat, mold, and mice, but failed to make repairs. The new owners had taken away tenants' rights to store their belongings in the garage or access the backyard, without a reduction in rent. This was especially difficult for tenants because Client YZ's youngest child really loved playing in the backyard after pre-school. When Client YZ's wife confronted the new owners about this, she was told that now that they owned the building, they could require the tenants to do whatever the new owners wanted. The new owners also made comments that Client YZ felt discriminated against him on the basis of familial status.</p> <p>In addition, then, to preparing for their eviction case and developing legal defenses to the relative owner move in, we also decided to take the affirmative steps of filing a Rent Board petition for decrease in housing services. Although the new owners have had the right to file the eviction lawsuit against Client YZ for nearly two months, they have not moved forward with the lawsuit. We think this in part due to our strong, early advocacy on behalf of Client YZ.</p>
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Optional Information on Collaboration with Other Advocacy Groups	N/A
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**PSA: 7**

**Provider: Contra Costa Senior Legal Services**

**Counties: Contra Costa**

Optional Success  
Story(ies)/Case Summary(ies)

(CASE #1) In April 2018, we assisted an 85-year old man to troubleshoot some financial issues he was having. His nephews were trying to pressure him to sell them his house for a very low price, or to take out an expensive reverse mortgage. We were able to refer him to CANHR for a consultation on reverse mortgages and assure him that he did not need to sign anything he was uncomfortable with. We also assisted him in advance planning with an Advance Health Care Directive and Surable Power of Attorney, naming his daughter as agent on both so she could assist him with these issues directly. (CASE #2) CCSLS assisted an 83-year old disabled client who had received a baseless notice of lease violation from the property manager. It turned out that this was the latest in a pattern of harassment. A detailed letter to the corporate VP spurred an investigation, and as a result, the manager's behavior was addressed, the violation notice was rescinded, and some additional work was performed to update the client's unit. (CASE #3) In May 2018, we assisted a 78-year old man and his wife with elder abuse. Their son, who was living with them and had brought three large dogs to their home, was becoming increasingly hostile and angry towards them. We assisted them with filing a restraining order and represented them at the hearing. The judge granted a five-year restraining order to protect them.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We are coordinating with Ombudsman Services of Contra Costa to provide services to residents of board and care facilities. We are also working in collaboration with other senior care providers, the district attorney's office, and others on a county-wide project to provide services to victims of elder abuse.

**PSA: 8**

**California Legal Services (Title III B)**  
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**Provider: Legal Aid Society of San Mateo County**

**Counties: San Mateo**

Optional Success  
Story(ies)/Case Summary(ies)

Ms. P is the representative payee for her sister, Ms. M, who is 80 years old, a Spanish speaker, experiencing some cognitive decline, and relying on Supplemental Security Income. Ms. P speaks only Spanish fluently and can speak and understand only basic English. At a Social Security redetermination interview for Ms. M, Ms. P was not provided a Spanish speaking interpreter, and misunderstood questions about Ms. M's living situation. The inaccurate information Ms. P provided caused SSA to reduce Ms. M's SSI benefit.

Ms. P came to Legal Aid for help. Ms. P met with the Senior Advocates attorney with the help of a Spanish interpreter, so that Ms. P could understand the SSI rule that had affected Ms. M, her right to appeal the decision by requesting a hearing, and that she had missed the deadline but could still submit a hearing request with good cause. The attorney helped Ms. M prepare the appeal, explained how to submit the appeal, and advised her to ask SSA to stamp her copy as received for her records. Finally, he provided Spanish SSA publications to ensure Ms. P understood the rules affecting Ms. M and her appeal rights.

Optional Information on  
Collaboration with Other  
Advocacy Groups

In June the Senior Advocates attorney collaborated with Peninsula Family Service, EDAPT, StarVista, HERA, and the San Mateo County Pride Center to present on a panel titled: "Planning for the Future: A Forum for LGBTQ+ Adults Aged 50+". He discussed some of the legal issues facing older adults, and how the aging LGBT community is at times overly impacted by these issues. Topics included financial security, discrimination, estate planning and life planning, and avoiding scams and identity theft.

**PSA: 9**

**California Legal Services (Title III B)**  
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**Provider: Legal Assistance for Seniors**

**Counties: Alameda**

Optional Success  
Story(ies)/Case Summary(ies)

Legal Assistance for Seniors represented the client in a elder abuse restraining order matter against her foster granddaughter.

Client is a 94 year old living with her relatives after five months living with the Respondent.

Respondent is a 39 year old daughter of a child that the Client helped raise as foster mother. When Respondent let the Client move in with her, Respondent changed her physical address and would not let other family members know where the Client was living. In addition, Respondent changed Client's telephone number and mailing address then took Client's social security card and identification card. Respondent also closed the Client's trust account and opened a savings account with the Client and the Respondent's name on it. When client's cousins finally found her, Respondent had coercively obtained a POA and AHCD from the Client. Without Client's permission Respondent withdrew \$20,000 via online banking from Client's savings account the day before her relatives picked her up from Respondents home. APS got involved and referred client to us for a restraining order.

LAS had an office visit and talked to the Client and her relatives about the restraining order. Despite some of the financial abuse having occurred in a different county LAS attorney assisted in preparing and filing an elder abuse restraining order.

LAS attended court with the Client which resulted in a contested court decision in our Client's favor. Client received a 2 year stay away.

Client was pleased to no longer have any interactions with the Respondent and to have copies of the fraudulently obtained POA and AHCD that the Respondent brought to court. Client was also grateful for being able to get a court order requiring Respondent to return the mail that she had been withholding from the Client for six months.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS' is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS also maintain collaborative relationships with the State Bar of California and the cities of Alameda, Fremont, Hayward, Livermore, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

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**PSA: 10**

**Provider: Seniors Adults Legal Assistance (SALA)**

**Counties: Santa Clara County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Collaboration With Senior Centers and Other Sites to Deliver Services**

For the 4th quarter of 2017-18, SALA provided on-site legal service intake appointments at 24 senior centers or sites in Santa Clara County. These sites included: These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center temporarily located at Gardner Community Center during Alma's renovation (San Jose), Seven Trees Center (San Jose) Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Los Gatos Recreation Center, Saratoga Senior Center, Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

**PSA: 11**

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**Provider: Building Stronger Communities Together      Counties: San Joaquin**

Optional Success  
Story(ies)/Case Summary(ies)

April 2018:  
The SLP provided services this month to a veteran: helped write a complaint against the Veteran's Health Administration for the poor services provided to him (veteran). He returned to the SLP grateful because his situation improved, and he had been provided better service. We feel happy to have helped someone who has served this Country.

May 2018:  
One of our Seniors asked if we could go to her house and assist her in making changes to her will. She is terminally ill and unable to come to the office, and we told her that we could go to her home and would be happy to help with her will.

At our first appointment, the Senior looked very upset and was very serious. As time went on, I found out that she had lost her daughter in January and that is why she seemed that way. She began to gain trust and vent about her life and what was going on and she is now a frequent senior and she now smiles. El Concilio Senior Legal Program not only fills out forms, but we also help seniors emotionally by listening to everything they have to say and that they do not feel alone.

Optional Information on  
Collaboration with Other  
Advocacy Groups

April 2018:  
We had knowledge of an alleged case of Elder Abuse. We reported it to APS, and the case was assumed by Qia Lor.

We responded to a request made by the HSA Social Worker, Kathryn Thomas, to support her with a woman with physical issues who could not be transported to the office. I went to visit her and helped understand what she needed.

June 2018:  
We had knowledge of two alleged cases of Elder Abuse, and we reported them to APS. The cases were assumed by Thara Thong.

**PSA: 12**

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**Provider: Catholic Charities Diocese of Stockton**

**Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu  
mes**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 13**

**Provider: Senior Citizens Legal Services**

**Counties: Santa Cruz & San Benito Counties**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 14**

**Provider: Central California Legal Services Inc.**

**Counties: Fresno and Madera Counties**

Optional Success  
Story(ies)/Case Summary(ies)

A senior US Military Veteran received legal advice from a pro bono attorney at CCLS's Fresno Vet Center Legal Clinic regarding expunging his criminal record. The pro bono attorney also assisted in the preparation of the court documents necessary to file and serve for expungement of the criminal records. Senior veterans receive pro bono legal services from CCLS volunteers and staff at two (2) monthly legal clinics held at the Fresno Vet Center.

Optional Information on  
Collaboration with Other  
Advocacy Groups

The CCLS Senior Legal Team and members of the Outreach Team participated in the 2018 World Elder Abuse Awareness Day event in Fresno, California.

**PSA: 15**



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**Quarter: 4**

**Provider: Central California Legal Services, Inc.**

**Counties: Tulare County**

Optional Success  
Story(ies)/Case Summary(ies)

An 81 year-old Tulare County senior contacted CCLS for assistance on a consumer dept matter involving disputed credit card charges. The credit card company continued to charge the senior for a monthly "protection plan" and annual fee, even though the credit card balance had been paid in full earlier in the year. The senior was assisted by an advocate on the CCLS senior legal team, who contacted the credit card company, and had the charges removed from the account.

Optional Information on  
Collaboration with Other  
Advocacy Groups

On June 7, 2018 CCLS staff from senior legal team participated in Elder Abuse training by the Office of the District Attorney County of Tulare, at the Visalia Convention Center. CCLS senior legal team staff also collaborated and networked with representatives of the Victim/Witness Assistance Division for the benefit of seniors in Tulare County who may be victims of crime, including elder abuse.

**Provider: Central California Legal Services, Inc.**

**Counties: Kings County**

Optional Success  
Story(ies)/Case Summary(ies)

A disabled senior living in rural Kings County was assisted by a CCLS staff attorney in an unlawful detainer (eviction) lawsuit, which involved preservation of the senior's Section 8 housing voucher. The CCLS attorney advocated on behalf of the senior and was able to obtain and provide documentation of a medical condition, which was beneficial to the client, and provided a defense to the unlawful detainer (eviction). The senior is able to retain the Section 8 housing voucher.

Optional Information on  
Collaboration with Other  
Advocacy Groups

On May 9, 2019 CCLS staff participated in the Kings County senior health outreach event in Hanford, which included coordinating with other community service providers for older adults in Kings County.

**PSA: 16**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: California Indian Legal Services**

**Counties: Inyo & Mono**

Optional Success  
Story(ies)/Case Summary(ies)

As we now have an emphasis to focus of our services towards more legal and community education including referrals, we are currently planning out the community education presentations that will be held at separate various seniors in Inyo and Mono counties for the upcoming quarters and provide continued distribution of recently updated referrals, legal education materials and self-help packets. During this quarter we received numerous requests for our legal education and self-help packets as well as provided legal services to assist seniors in preparing and / or completing these important forms. We also provided an Elders Workshop on legal topics affecting the senior community. The clients and other individuals were very appreciative of our workshop, legal assistance and self-help packets.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 17**

**Provider: Senior Legal Services Project**

**Counties: San Luis Obispo**

Optional Success  
Story(ies)/Case Summary(ies)

☐ Helped a 76 year old north county woman obtain a restraining order against her drug addicted son.  
☐ Appealed the denial of an application for disability filed on behalf of a 62 year old disabled former hotel maid whose request for disability was denied. After nearly two years of representation, client received \$22,000 in Social security Disability back pay from the social Security Administration.  
☐ Obtained a 3-year Elder Abuse Restraining Order after hearing on behalf of a 77 year old woman whose son was living in her shed, without her permission, notwithstanding the fact that she had already evicted him. Son was doing drugs on client's property, inviting unsavory friends onto her property, destroying property and threatening the client, her neighbors and her care providers.  
☐ Hoarder client living in subsidized housing faced eviction. Represented client and negotiated a stipulation giving client 12 months to clean out unit in order to avoid eviction. First two inspections have been very successful.

Optional Information on  
Collaboration with Other  
Advocacy Groups

N/A

**PSA: 18**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

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**Provider: Grey Law of Ventura County**

**Counties: Ventura County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 19**

**Provider: Bet Tzedek**

**Counties: Los Angeles County**

Optional Success  
Story(ies)/Case Summary(ies)

N/A

Optional Information on  
Collaboration with Other  
Advocacy Groups

N/A

**PSA: 20**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: Inland Counties Legal Services, Inc.**

**Counties: San Bernardino**

Optional Success  
Story(ies)/Case Summary(ies)

Case #1: 18P-0002976

ICLS's client is a 67 year old disabled woman who recently lost her Medicare Savings Plan (SLMB) Part B premium assistance because she was over income. She also had a high Share of Cost Medi-Cal. The client struggled to pay her rent and had to panhandle to feed herself on a few occasions.

The ICLS advocate was able to assist the client in understanding the 250% Working Disabled Medi-Cal program. The client then obtained employment and applied for this program. She was approved in May 2018 for full-scope Medi-Cal with a small monthly premium. Now she has coverage for her on-going medical treatment. Through her Medi-Cal the State of California will cover her Medicare Part B premiums providing her with an additional \$134.00 per month.

Case #2: 18E-0003802

The client is a 76 year old married woman who contacted ICLS for assistance regarding an overpayment in excess of \$30,000. Social Security claimed that he had been overpaid. According to the client, in 1997 he moved to Japan to work selling equipment around the world. He returned to the United States in 1985, returned to Japan in 1993 and worked until he retired in 2007 or 2008 when he moved back to the United States. He waited until he was 70 to apply for his Social Security Retirement benefits which he has been receiving since 2012.

In April 2018 the client received a Notice of Action dated April 6, 2018 from Social Security (SS) notifying him that he had been overpaid \$31,740 from 2012 to the present. When he contacted Social Security he was informed that it was due to the Windfall Elimination Act Provision which he did not understand and Social Security would not explain to him.

The ICLS advocate explained to the client that the Windfall Elimination Act is a law passed by Congress to avoid an individual from receiving too much Social Security coupled with a large pension. Congress considers this to be "double dipping". The Windfall Elimination Act was created to affect persons who collect a pension from an employer who did not pay into Social Security. A percentage of the pension amount is deducted from the Social Security Benefit amount.

The advocate advised the client that Social Security uses a formula to calculate the amount his Social Security benefits would be reduced by based on the amount of his pension. After reviewing the client's documents, the advocate advised him that because the Windfall Elimination Act is the law, Social Security can and will reduce his benefits based on his pension from Japan, but that the law also states that if the person is found not to be at fault in causing the overpayment, the overpayment can be waived.

The advocate further advised the client that based on his Social Security Notice of Action dated April 6, 2012 in which Social Security listed the responses he gave on his application when he first applied for Social Security, he had informed Social Security that he was receiving a pension from Japan. It is obvious that a pension from an employer in another county would not have paid into Social Security and

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the Social Security office should have caught this, instead of letting it go for six (6) years. The client was advised to immediately file a Request for Reconsideration with Social Security. He has 65 days from the date of his notice to appeal. The first step in the appeal process is to file a Request for Reconsideration and that even though he still had time the advocate strongly advised him to file immediately. Social Security would review his file and issue a written decision. When he receives the decision he needed to read it immediately, and, if he disagreed he should then file for a Hearing with an Administrative Law Judge (ALJ). This must be filed in person and within 65 days from the date of the decision letter. The advocate further advised the client to bring to Social Security's attention that he had informed them that he was already receiving a pension from Japan when he had applied for Social Security and that it was Social Security's responsibility to inquire immediately about his pension in Japan instead of waiting for six (6) years to charge him with an overpayment.

He was further advised by the advocate that it would probably go to hearing and to be prepared for that. He appears to have a very solid defense for a waiver of the overpayment since Social Security had, in their own documentation, knowledge of the Japanese pension and took no action at that time.

Optional Information on  
Collaboration with Other  
Advocacy Groups

In-Kind Support to Title III-B Legal Services for Seniors  
Department on Aging & Adult Services  
(Hours not reported elsewhere in Quarterly Report)

9 In-Kind Case Hours  
0 In-Kind Supervision Hours (case related)  
0 In-Kind Outreach Hours  
0 In-Kind Community Education Hours  
0 In-Kind Other Hours

**PSA: 21**

**California Legal Services (Title III B)**  
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**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: Inland Counties Legal Services, Inc.**

**Counties: Riverside**

Optional Success  
Story(ies)/Case Summary(ies)

Case #1: 18E-00037444. The client is a 91 year old minority gentleman who lives in rural Riverside County. He does not drive but is able to access bus transportation. He volunteers with the Banning Senior Center and is actively involved helping others in his community. He met with the ICLS advocate at the Banning Senior Center requesting help in preparing a simple will. The advocate reviewed his income and assets and discussed whether he had beneficiary selections for his checking and savings accounts or for any other assets that might benefit by not going through probate. Legally if there is a beneficiary selection on an asset such as a checking or savings account the account avoids going through the probate process and thereby lowers the estate value and thus incur lower probate fees. The advocate prepared a will for the client and reviewed it with the client. He was instructed to keep the will in a safe place and not to make any written changes on the legal document. Should he want to amend the will at a later date he can contact ICLS again for services as long as he resided in either Riverside or San Bernardino Counties.

Case #2 18E-0004549. The client is a 60 year old woman with both mental and physical disabilities that required a home visit. She had lost her long time significant other last year. The client's sister had not only encouraged the client to prepare a will and financial power of attorney, she went further and prepared them for the client and took the client to a notary to have both documents notarized. The client does not get along well with her son (who was the 1st choice agent) or her sister (the 2nd choice agent) on the financial power of attorney and the client requested that the ICLS advocate prepare a revocation of the financial power of attorney. The advocate prepared the document for the client and it was notarized. Both parties, the client's son and sister, were notified in writing that their duty as attorney-in-fact had been revoked. They also were sent a copy of the notarized revocation. The client received a copy of all the work that was done on her behalf and told the advocate that she was not ready at this time to have a new financial power of attorney prepared. The client did, however, request help in preparation of a simple will (18E-0003742) which the advocate prepared as well as a Medical Power of Attorney (18P-0005050) which was also prepared on the client's behalf.

Client #3: 18P-0004941. ICLS's client is a 65 year old woman with Medicare and Medi-Cal who came to ICLS for help because she had been briefly disenrolled from Inland Empire Health Plan (IEHP) without her knowledge. She had gone to an IEHP contracted Urgent Care. When the provider tried to bill IEHP for her appointment the bill was rejected due to disenrollment. The provider then tried to bill the client for services despite her status as a Medi-Cal beneficiary. The advocate contacted the Medi-Cal Managed Care Ombudsman who explained that the client had been disenrolled from IEHP in February 2018 and reenrolled in April 2018. The advocate then contacted the provider and explained that billing Medi-Cal beneficiaries is prohibited in California. The provider refused to dismiss the \$115 bill and threatened to send the bill to Collections. The advocate submitted an appeal to IEHP on the client's behalf requesting that IEHP cover the bill and services during the brief disenrollment period because IEHP had failed to notify the client regarding the disenrollment. After the appeal, IEHP confirmed that they had paid the provider and that the provider would not be seeking repayment for any portion of the services rendered from the

**California Legal Services (Title III B)**  
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**Quarter: 4**

client.

Case Story #4: 17E-7006034. The client is a 67 year old divorced woman who came to ICLS requesting assistance regarding an SSI overpayment in excess of \$7,000. She spoke and understood limited English and was more comfortable in Spanish. The conversations were held in both English and Spanish. In 2005 the client was diagnosed with Chronic Lymphocytic Leukemia and has been on chemotherapy on and off since then. Due to the severe side effects of the chemotherapy treatments she suffers from extreme fatigue and depression along with the inability to focus, understand and make rational decisions. Per the client, she cannot afford to pay the overpayment; as it is, she barely has enough to get by. Her medical condition requires her to eat well and keep her blood count up and she cannot afford to pay it back. The overpayment resulted because during the housing bubble she lost her home to foreclosure and received \$6,000 in 2011 under the Cash for Keys program. She failed to report this to SSI because she was unaware she was required to report it. She was under the impression that she had filed for a waiver and was denied because SSI continued to deduct from her SSI benefits. After filing for a Hearing with an Administrative Law Judge (ALJ), the advocate represented the client at her hearing on December 1, 2018. The ALJ determined that the client was not at fault in causing the overpayment due to her medical condition and SSI being her sole source of income. It would be a hardship to require her to repay the overpayment and the ALJ issued a "Fully Favorable" decision. The overpayment amount of \$5,829.36 was waived. In addition, she would receive benefits for the time she was supposedly overpaid.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 22**

**California Legal Services (Title III B)**  
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**Quarter: 4**

**Provider: Legal Aid Society of Orange County**

**Counties: Orange**

Optional Success  
Story(ies)/Case Summary(ies)

1. Client is a 67 year old male. Sometime in June 2017 client received a letter from ERS Educators Retirement Services, informing him that he is the primary beneficiary, to his ex partner's 403 (b) retirement fund for \$ 11,000.00. His ex partner passed away in 2008 in Alberta, Canada. ERS requires that client obtain a Death Certificate and complete the form sent to him by ERS to receive the money. Client has tried to get the Death Certificate from Canada multiple times but has been unable to get the death certificate. A representative from ERS also tried to obtain the death certificate from Canada but was unsuccessful.

Canada has a closed records system for birth and death certificates. Only family members or a court order (probate) can release the records. The deceased was client's life partner for over 20 years. Client would have married the deceased but the laws of California at the time did not allow gay marriages. The deceased's family in Canada refused to assist client with obtaining the death certificate because they were still in denial that the deceased was gay.

SCLAP assisted client with obtaining the Canadian death certificate after multiple letters to the Alberta Vital Statistics. After obtaining the death certificate, SCLAP forwarded the documents to ERS and client received a check of \$8763.90 representing the net proceeds after state and federal taxes were deducted.

2. Client is 68 years old. Client has been married for over 20 years. Client's spouse suffered from dementia and client could no longer care for his spouse full time. Spouse's brother came to the home and said he would care for his sister with the understanding that client could visit his spouse anytime. After client's brother in law took client's wife away, client was prevented from seeing his spouse. About 1 month later, client was served with the Petition for Dissolution. Client does not believe that spouse understood what she was signing due to her mental incapacity. SCLAP assisted client with the response to the dissolution and also filed an elder abuse restraining order against the brother in law for the purpose of trying to negotiate a visitation plan (prior attempts by SCLAP for visitation were ignored). At the restraining order hearing, the Court appointed a Guardian Ad Litem to determine the spouse's wishes. The Guardian Ad Litem who was initially denied access to client's wife, reported to the Court that client's wife did not even know about the dissolution. She was under the impression that client was filing the dissolution against her. It was also revealed that during the wife's stay with the brother in law, he cut off all of her government benefits such as SSI and IHSS. The brother in law and his attorney admitted to the court that they just placed the documents in front of client's spouse and told her to sign. After protracted litigation in the Elder Abuse Restraining Order, SCLAP was able to get visitation orders with this spouse. SCLAP is currently also representing the client in contesting the dissolution and establishing a conservatorship over his spouse. Both cases have appointed a Guardian Ad Litem and both cases are expected to be protracted litigation as the brother in law is extremely wealthy and has shown in the Restraining Order hearings, that he does not care to comply with Court Orders.



***California Legal Services (Title III B)***  
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Optional Information on  
Collaboration with Other  
Advocacy Groups

N/A

**PSA: 23**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: Elder Law & Advocacy**

**Counties: San Diego**

Optional Success  
Story(ies)/Case Summary(ies)

**Case 1**

In April 2017, client agreed to sell his interest in real property to another family member for \$15,000. The purchaser has only paid \$10,000 and purchaser has been non-responsive to client's demands for the balance of \$5,000 of the purchase price. The Elder Law & Advocacy attorney wrote a demand letter to the purchaser. In response to the demand letter, client received the balance of \$5,000 owed on the purchase of the real property.

**Case 2**

Client listed his wheel chair for sale on Craig's List for \$350. He received a text message response from a buyer who agreed to client's asking price. When client received the cashier's check from buyer, the check was made out in the amount of \$1,950. Client recontacted buyer and buyer told client that the additional \$1,600 was to cover reimbursement to hire movers to ship the chair to the buyer and an extra \$50 to client for the inconvenience of hiring the movers.

The cashier's check was taken to client's bank and approved for deposit. After approval from the bank, client withdrew \$1,550 in cash and was directed by the buyer to wire transfer these funds to the buyer. Client felt that he needed to reimburse buyer for the moving fees as he would not be arranging to hire movers. Client's first attempt to wire transfer the funds was unsuccessful and the buyer then instructed client to deposit the cash into a specific account at another bank. Client successfully deposited these funds as instructed. After these funds were deposited, client learned from his bank that the cashier's check was counterfeit and client's bank debited his account for the face amount of the cashier's check of \$1,950.

Client had now suffered a net loss of \$1,550. Client appealed his bank's decision to not recognize that he had been defrauded and asked to be reimbursed for the \$1,550. Client cited in his appeal that his bank had "approved" the cashier's check and that his subsequent investigation had determined that the cashier's check was so obviously counterfeit that his bank knew or should have known it was fraudulent. Client's bank declined to refund the money.

The ELA attorney wrote a letter to the fraud committee of client's bank asking for reconsideration and setting forth the evidence that the cashier's check was blatantly counterfeit. Based on the attorney's letter, the bank reconsidered their decision to deny client's claim and reimbursed client for his loss of \$1,550.

Optional Information on  
Collaboration with Other  
Advocacy Groups

N/A

**PSA: 24**

**California Legal Services (Title III B)**  
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**Provider: Elder Law & Advocacy**

**Counties: Imperial**

Optional Success  
Story(ies)/Case Summary(ies)

**Success Story #1:**

In late 2014, an insurance agent appeared at Client's door and sold her a Medicare supplement policy. The Client is over 80 years of age, widowed, and has disabilities, including partial blindness. In addition to switching Client's insurance policy, he also encouraged her to purchase a health care discount card. The agent had several company brochures and is a California licensed insurance agent. While the Medicare supplement policy was a legitimate policy, the agent later used Client's checking account information to debit over \$8500 in unauthorized charges from her account, over a year and a half period. Client is partially blind and did not realize the charges were being made to her account. Client kept running out of money and was unable to purchase necessary medications because her account was overdrawn several times. Client received absolutely no benefit or services from the discount card, and the charges were unauthorized.

Once Client discovered the charges, she came to ELA for assistance. The attorney found the particular insurance agent had previously been ordered to cease and desist from selling insurance in another state. The Client contacted two state agencies, but neither took any action. The ELA attorney wrote a demand letter to the agent, citing financial elder abuse laws, but the agent provided no response. The agent contacted Client several times and strung her along with promises of repayment. The agent changes his address frequently, uses multiple business names, and uses a postal store for his publicly available address. After failed efforts to get law enforcement to take her case, Client decided to file a small claims case against the agent. She was eventually able to obtain a judgment against the agent in the amount of \$7089.00, and will record an abstract in hopes she may eventually be able to eventually collect the judgment. She also is informing the Department of Insurance. While she understands it may be difficult to collect the judgment, she was adamant something be done as he the agent will continue to move locations and defraud other seniors.

**Success Story #2:**

Our Client, a 74 year old widow, who does not read or speak English, sought advice on a probate issue. Client's spouse passed away several years ago, but the property title stood only in the late spouse's name due to a prior refinance. Client was referred to our office by the court when she attempted to file documents prepared by a paralegal (at her son's request).

After reviewing Client's documents, the ELA attorney advised Client she had signed a declaration giving away any interest in her own home. The documents gave her property to children and grandchildren. Client did not realize the contents of what she had signed, as they were not explained to her. Client was advised not to file the petition, and the ELA attorney offered to prepare the correct documents to have property put back in her name. The attorney assisted Client with preparation of a Spousal Property Petition, which was approved by the court. Without ELA's assistance, Client would have unknowingly given away her property rights in her own home, putting her at risk for eviction, judgment, or other

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

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exploitation.
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Optional Information on  
Collaboration with Other  
Advocacy Groups

N/A
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**PSA: 25**

**Provider: Bet Tzedek**

**Counties: Los Angeles City**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 26**

**Provider: Legal Services of Northern California**

**Counties: Mendocino and Lake**

Optional Success  
Story(ies)/Case Summary(ies)

N/A
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Optional Information on  
Collaboration with Other  
Advocacy Groups

N/A
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**PSA: 27**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: Legal Aid of Sonoma County**

**Counties: Sonoma**

Optional Success  
Story(ies)/Case Summary(ies)

Mildred is 78 years old. She has a heart condition and COPD. She depends on her Section 8 subsidy to pay her rent. Mildred's daughter and grandson were abusing her. They confined Mildred to her room, took away her telephone, stole money from her and denied her food. After four days without food, she located a phone and called 911. Mildred was taken to the hospital, and then to a sent rehabilitation home to recuperate. While in rehab, she received notice that the housing authority was terminating her Section 8, and that she was being evicted from her apartment due to the behavior of her daughter and grandson. Mildred contacted Legal Aid. Legal Aid's Housing Outreach Attorney and Elder Outreach Attorney worked together to guarantee her safety and save her housing.

- ☐ Keeping Mildred Safe: Legal Aid obtained a restraining order to remove the client's abusive daughter and grandson from the apartment and prevent them from returning. We also compelled the landlord to change her locks.
- ☐ Stopping the Eviction: Legal Aid then enforced Mildred's right, as a victim of domestic violence to have the eviction notice rescinded.
- ☐ Preserving Mildred's Housing: Legal Aid represented Mildred at her Section 8 hearing with the City of Santa Rosa. After the hearing, the City rescinded the termination of her voucher. Because of Legal Aid's intervention, Mildred was able to keep her low-income housing.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Link to the article on elder abuse in the Press Democrat: <http://www.pressdemocrat.com/news/8431046-181/elder-abuse-and-neglect-reports>

**PSA: 28**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: Legal Services of Northern California**

**Counties: Solano**

Optional Success  
Story(ies)/Case Summary(ies)

1. Ms. K. came to our office after receiving a warning notice about her animals. Ms. K. informed her apartment manager that the animals were emotional support animals yet the complex ignored her reasonable accommodation request and issued a 30-day notice to quit. LSNC assisted Ms. K. in filing a Fair Housing Complaint with the Department of Fair Employment and Housing. LSNC monitored review of her fair housing complaint and agreed to represent her in a formal mediation with DFEH and her apartment manager. As a result of this mediation, Ms. K. reached a settlement with the complex whereby the complex agreed to pay her for damages and institute fair housing policy changes throughout the complex.

2. Ms. M. came to our office after receiving a 60 Day Notice that did not comply with California law. Ms. M. had several habitability issues on the property and had also received an illegal rent increase notice. LSNC wrote a demand letter on Ms. M.'s behalf and sent it to her landlord. As a result, Ms. M.'s landlord agreed to rescind her rent increase. The landlord also agreed to work with Solano County Environmental Health to abate the habitability issues. Ms. M. was able to retain her housing at an affordable price.

3. Ms. B. came to our office after receiving a Notice of Levy from the Sheriff's Department as a result of a judgment in a debt collection lawsuit. Ms. B. receives only Social Security income and has no assets. Our office assisted Ms. B. with filling out a Claim of Exemption form, a Financial Statement form, and declaration regarding her income. LSNC instructed Ms. B. on filing the documents with the sheriff and how to prepare for the hearing if the other party opposed the claim of exemption.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Continued participation with community groups including: Solano Senior Coalition and Vallejo Senior Roundtable. Continued collaboration with Ombudsman Services in Solano County and Senior Legal Hotline.

**Provider: Bay Area Legal Aid**

**Counties: Napa**

Optional Success  
Story(ies)/Case Summary(ies)

N/A

Optional Information on  
Collaboration with Other  
Advocacy Groups

senior service providers / seniors

**PSA: 29**

**California Legal Services (Title III B)**  
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**Provider: Senior Legal Services**

**Counties: El Dorado**

Optional Success  
Story(ies)/Case Summary(ies)

n/a

Optional Information on  
Collaboration with Other  
Advocacy Groups

n/a

**PSA: 30**

**Provider: Dor v' Dor Senior Advocacy Network**

**Counties: Stanislaus**

Optional Success  
Story(ies)/Case Summary(ies)

Assisted client who purchased mobile home get satisfaction on additional work that was promised to be completed but never was.

Assisted a widower have all the debts' of his wife forgiven as she had passed away.

Helped 2 clients with incorrect billing from Direct TV

Optional Information on  
Collaboration with Other  
Advocacy Groups

We continue to work closely with the Ombudsman office and APS on elder abuse cases occurring in assisted and skilled nursing facilities.

**PSA: 31**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: Central California Legal Services**

**Counties: Merced**

Optional Success  
Story(ies)/Case Summary(ies)

May 2018

CCLS helped a senior kick out an abuser who was verbally and emotionally abusive. The abuser would berate and humiliate the senior causing immense anxiety. Once the abuser found out that CCLS was helping the senior, the abuser became even more irate. However, CCLS was able to evict the abuser without incident and without further harm to the client.

The senior is now happily free of the abuser and is recovering from the mental and emotional abuse that the abuser wrought upon the senior.

June 2018

On June 20, 2018, senior legal services were provided at the Los Banos Community Center. Seniors who participated in the clinic received free legal advice on estate planning, including the preparation of simple will, durable power of attorney, and advanced health care directive documents.

Optional Information on  
Collaboration with Other  
Advocacy Groups

May 2018

CCLS Senior Legal Team staff attorney, Michael Neham, worked collaboratively with Valley Caregiver Resource Center (VCRC). On May 24, 2018 Mr. Neham conducted community legal education at VCRC in Merced on Financial Power of Attorney, Advanced Healthcare Directives, and POLST forms. This included a question and answer session, in addition to providing information about other CCLS program services.

June 2018

On June 25, 2018, CCLS senior legal team attorney Christopher Goodness attended the Merced AAA Advisor Council meeting at which time he concluded his presentation and training to the Council on ethical issues.

**PSA: 32**



**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

**Provider: Legal Services for Seniors**

**Counties: Monterey**

Optional Success  
Story(ies)/Case Summary(ies)

This is a story of one of our South County outreach clients:  
A client came to our Salinas office from her home in King City. Our client, a widow, had never learned to drive so when she had to go to appointments outside her home in King City, she engaged the services of a local cab company. Our client was worried, telling our advocate that the cab driver who had driven her to Salinas a few times in the past began asking her for money – mentioning that since she “had enough money for a cab all the way to Salinas” that she could afford to give him a \$300 loan. When she refused, he began harassing her by phone, leaving “scary” voice mails. He asked her to borrow money multiple times. Our client ignored his phone calls.

When our client next needed to go to Salinas for a doctor’s appointment, she called the Cab company to request that she not get the same cab driver ever again. Apparently, the cab company told their driver about our client’s call, since the cab driver called her that same day, threatening her, asserting she had “made up” the story about his asking for a loan. Our client went to the local police department, the police told her that they would call the cab driver and tell him to stop calling her. The police told her that they called but he hadn’t been answering. During that time, the cab driver was still calling her daily.

When the client came to us, our Salinas advocate called the cab company to let them know this abusive behavior was still going on. The cab company, now knowing our client had a legal representative to assist her, assured our advocate they would put an end to the cab driver’s harassment. Immediately, the calls from the driver to our client stopped. And now, even though that driver will never be called for our client for a ride, our advocate went beyond just legal representation to inform our client about the Monterey-Salinas Transit’s (MST) “Rides” program which travels to South County for just the type of clients who need transportation. Our client had not known about MST Rides and was thrilled to start using their services, which were significantly less expensive.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Services for Seniors continues to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center, the Santa Cruz Senior Citizens Law Center, other agencies and organizations. With a recent Homeless Community grant from the Community Foundation of Monterey Grant for assistance, we have begun discussing legal assistance hours with the Gathering for Woman non-profit.

**PSA: 33**

**California Legal Services (Title III B)**  
**PSA Level Quarterly Narrative Report**

**Fiscal Year: 2017-2018**

**Quarter: 4**

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**Provider: Greater Bakersfield Legal Assistance, Inc.    Counties: Kern County**

Optional Success  
Story(ies)/Case Summary(ies)

The Senior Law Center Project assisted a long time tenant obtain title to real property. Our client lived in a home since about 1995 and paid rent until 2006. The original owner of the property died in 2001 and the spouse passed away in 2006. After this time, client was not sure who to pay rent to. CL tried to pay rent to an alleged step-son of the owner, but the rent payments came back. The title to the property was in the sole name of the spouse that passed away in 2001 and the estate was never probated. In 2011, the property was to be sold in a tax lien sale. To prevent the loss of their home, our client paid the property tax of \$11,000.00+ and have continued to pay the taxes on an annual basis up to and including property taxes for 2017-2018 for more than 5 consecutive years. Based on these facts, the Senior Law Center Project filed a Quiet-title Adverse possession claim in the Kern County Superior Court. After giving proper notice to all possible parties on May 1, 2018 the Court granted our claim and awarded sole title of the home our clients had lived in and maintained since 1995.

Optional Information on  
Collaboration with Other  
Advocacy Groups